

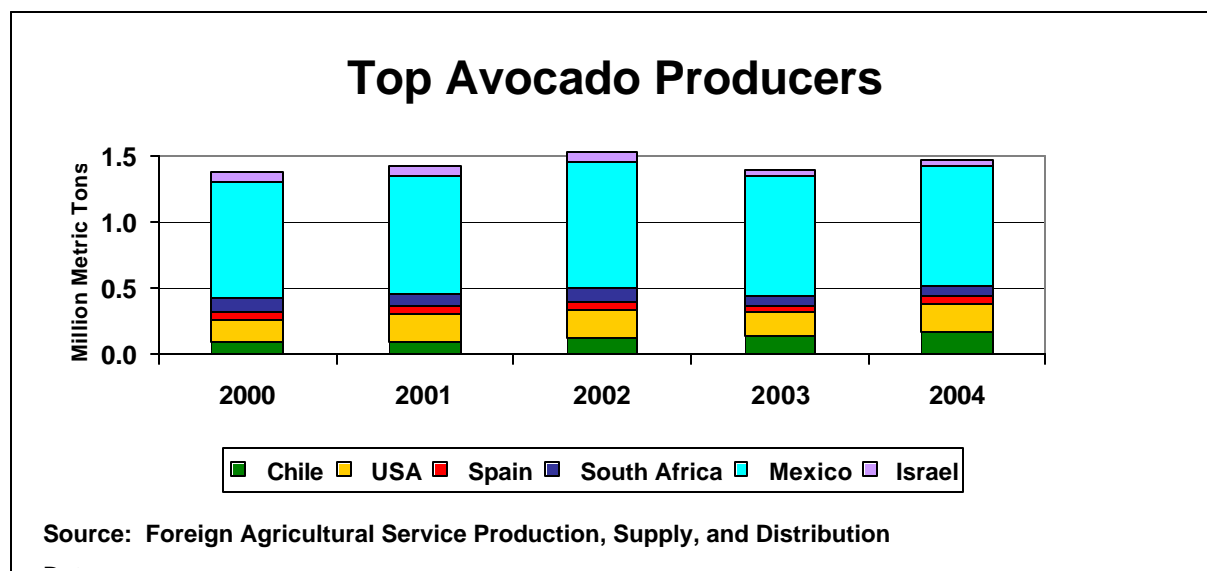
## World Avocado Situation and Outlook

**Total U.S. production of avocados during the 2003 – 2004 season increased 10 percent from last year to 197,204 metric tons. California accounted for 92 percent of production, followed by Florida with 8 percent.**

### Global Production and Trade

Mexico, the United States, Chile, South Africa, Spain and Israel are the world's leading producers of avocados. Mexican avocado production for 2004/05 is estimated at 1.03 million tons. Chilean avocado production is forecast at 200,000 tons. Production is expected to rise for all other major producers as well, leading to a world crop of 1.45 million tons in 2003/04.

Mexico is the leading exporter of avocados, with exports of 135,000 tons in calendar year (CY) 2003. Chile, South Africa, Spain, Israel and France round out the top six avocado exporting countries. The leading importers of avocados are France, the United States, the Netherlands, the United Kingdom (UK), Japan, Germany and Spain.



### Mexico

Due to favorable weather conditions, programs that have successfully controlled pests, and more trees coming into production, total Mexican production of avocados in 2004/05 was 1.03 million tons, up 16 percent from the 2003/04 crop due to favorable weather conditions, programs that have successfully controlled pests, and more trees coming into production. The state of Michoacan remains the main producing state in Mexico, accounting for more than 88 percent of total avocado production. Annual per capita consumption in Mexico is about 8 kg, which is above the world average range of 3 to 5 kg.

Mexican avocado exports are forecast to reach a record 135,000 tons in marketing year (MY) 2004/05, a 29 percent increase from last year, due mainly to larger production and the announcement of year-round market access for most of the United States. Previously, Mexican Hass avocados could only be distributed in 31 states due to phytosanitary concerns.

USDA regulations governing the importation of Mexican avocados were amended and became effective on January 31, 2005. The rule expands the number of states in which fresh Hass avocado fruits grown in approved orchards in Michoacan, Mexico, may be distributed. The new regulation also allows for the distribution of the avocados during all months of the year. For the first two years following the effective date of the rule, avocados may be distributed in all states except California, Florida and Hawaii. Mexican avocados may be exported to all U.S. states beginning in the third year of the rule's implementation. In FY 2003, U.S. imports of avocados from Mexico were valued at \$43 million. During the same year, U.S. imports from the world totaled \$148 million.

### **United States**

Total U.S. production of avocados during the 2003/04 season was 197,204 tons, up one percent from the previous year. In 2003/04, the California avocado crop will likely be larger than the previous season, despite crop damage associated with late October wildfires that engulfed the southern portion of the state. With the anticipated larger crop, growers prices in California will likely average lower than in 2003/04. U.S. exports in FY 2004 increased 26 percent for the fifth consecutive year. U.S. imports of avocado during 1998 to 2004 (MY) increased 155 percent to 95,587 tons.

### **South Africa**

In 2003/04 (MY), South African production of avocados reached 70,000 tons, but is expected to increase 2 percent in 2004/05 from the previous year. The fruit size was also small, as a result of high temperatures and insufficient moisture. Sunburn particularly affected Hass varieties. The production season for South African avocados is between March and October. South Africa's major competitors in the European markets are Spain, Peru, Kenya and Israel.

Exports for 2003/04 are forecast at 38,000 tons, approximately 35,000 tons of which are exported to Europe. The industry projects an increase in annual exports of roughly 12,000 tons by 2012. The industry expects to continue with generic promotion in Europe.

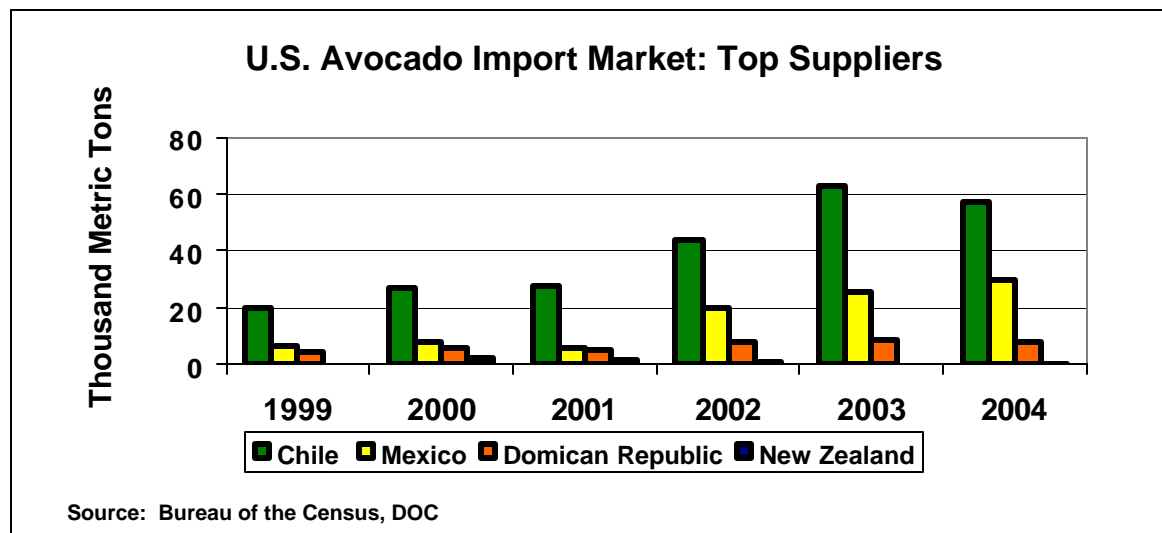
## Spain

Domestic avocado production is expected to increase moderately in the coming years in response to new orchards planted in non-traditional areas. However, the 2004 production is projected to decline to about 55,000 tons due largely to an off-year in the bearing cycle. Exports in 2003/04 are forecast at 48,000 tons. About 97 percent of these exports are shipped to other European Union (EU) countries.

## Israel

Due to good weather conditions Israel's avocado production for MY 2004 is forecast at 77,000 tons, a 57 percent increase from the previous year. Avocado exports are expected to increase by 73 percent compared to the previous year, mainly to the EU. Avocado production in MY 2003 totaled 49,000 tons, unchanged from the previous year, as a result of un-favorable climate conditions during the end of the blooming period. Exports from Israel during MY 2003 totaled 26,000 tons, a 3.7 percent decrease compared with the previous year.

Almost all of Israel's avocados are shipped to Europe (97 percent of total exports). While Israeli avocado exports to Russia, Poland and the Netherlands increased in MY 2003, France still remains the largest market for Israeli avocados. Exports to Russia are expected to increase further, reaching an estimated 1,200 tons.



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